



SYMPATIC

Support and Value Adults Mobility and
Training for Integration into Companies

Co-funded by the
Erasmus+ Programme
of the European Union



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2019-1-FR01-KA204-062318

Occupational Profile

Intellectual Output 1

May 2020

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1 Introduction

The situation of youth employment for young people under 30 remains alarming in many countries of Europe and as well in the regions where the SYMPATIC partnership is located youth unemployment is an important issue to be addressed. At the same time employers experience in many sectors a skills mismatch or a shortage of skilled workers. This is also true for the tourism sector on which SYMPATIC focuses its activities.

SYMPATIC partners have long lasting experience in working with young and often disadvantaged young adults, organizing international mobilities with them. They are, as many other organisations all over Europe specialized in organizing mobilities for young people abroad. Usually they have good and long-lasting networks with companies in other countries who receive the young persons for volunteering, internships or work experiences. But the SYMPATIC partnership detected as a shortcoming that in many cases the support for the young person ends with the return to their hometown and does not unfold the full potential of mobilities as a means of socio-professional integration. In the best case a reflection of the experience abroad organised by the sending organisation takes place, but mostly there is no network with employers available and the systems of support for the young person to develop a long-term professional perspective in their hometown (or elsewhere) seem to be not very accessible as the young people quite often don't make the step to seek support from another service.

The reason for this might also be that in many cities there are structures in place that offer Information Advice and Guidance to young people but young people don't know about this or it is a too big threshold to go to a new service and build a relationship with a new person. An additional difficulty is that regular IAG practitioners are many times not so familiar with the concept of mobilities abroad and how to valorise this experience with the young person and towards employers.

The innovative idea of SYMPATIC is to tackle this issue with 3 different actions:

- sensitizing companies and employers for the experiences and competences gained by young people during an international mobility. Additionally, the work with the companies entails a training offer for employers or HR responsible for a tutoring programme with the aim to raise awareness with employers to design internal structures that enable a good onboarding process and lead to sustainable working relations.
- The 2nd action targets the staff of the mobility organisations that are very experienced in working with young people and supporting them during their stay abroad but usually don't have the expertise to work with the young people on their career decisions and perspectives in detail which would be needed, not to lose the young people after their return. To meet this need a training course for professionals working with young people in mobility programmes is designed to qualify them as a jobcoach and encourage the organisations to think the mobility as a whole process of professional orientation, meaning support young people from the beginning of the mobility with a focus on professional orientation and individual development and a follow up that goes beyond the reflection of the experience abroad but clearly aims at finding work.

- The last action of SYMPATIC is to develop a platform that helps to match employment offers and young people's profiles focusing on soft skills needed for the open position and the experiences and informally gained skills of the young person.

At the time when the concept of the project was developed in spring 2019, the tourism sector (including gastronomy and the cultural industry) was a prosperous and important economic sector with high numbers of employees and various employment opportunities in all five project regions: Marseille, Hauts-de France, Lombardy, Cyprus and Berlin. Because of this it was chosen as the context of all piloting actions for SYMPATIC.

When the project started, soon the Covid-19 pandemic changed many parameters on which the project idea was built, but two special challenges arose for SYMPATIC: due to the worldwide travels restrictions the businesses in the tourism sector belong to those who were affected first and probably hardest by the crisis. This had the effect for the work in SYMPATIC that many employers approached by project partner were not open to participate in interviews and further project activities as they were very concerned and needed to adapt to the new situation. Especially they didn't want to think about hiring new young people in the future, as their main concern was how to deal with the current staff in the difficult economic situation.

The second insecurity are the mobilities themselves as most exchange and mobility programmes in Europe were stopped in the beginning of March 2020 and it is not clear when they will start again.

For this publication it means that all data gathered in the desk research is a picture of a pre-crisis situation and only partially informative for the further work of SYMPATIC. Additionally, not all interviews could take place as business owners were not willing or had no capacity to engage in project activities. This is also true for the commitment to further project activities such as taking part in the Tutor training or publish open positions in the future platform.

As a reaction the partnership decided to add a short chapter gathering the information currently available on the situation in all project regions and reflections on how this new situation will affect the work within SYMPATIC.

The objective of this first Intellectual Output is to build a good basis for all further work on the project, to gather up to date information on the different local context and collect first-hand information by employers that will help to design need based training programmes for tutors and jobcoaches in the following productions and to build a sustainable network with employers who will go forward to the training activities and be active on the platform planned in IO4. Altogether this will ensure a common understanding of all following activities in the partnership and that all project activities correspond in the best way possible to the beneficiaries' needs.

As circumstances have changed due to Covid-19 outbreak the partnership decided to use this production to investigate as well on the current situation in all regions and think about ways to implement the project despite the challenges. All assessments of the crisis are subjective observations as almost no validated data is available. To be informed about the impact of the pandemic on the project and the labour market situation you can follow the development of IO2 and IO3 and an additional chapter will be added to this publication in the end of 2021 to reflect the dynamic development in the meantime.

2 The Local Contexts - The Work of the Partner Organisation

The aim of SYMPATIC is to embed enhanced Information Advice and Guidance for young people in regard to their professional development before, during and especially after a mobility programme. A special focus of all project activities lies in valorising the experiences the young person has made abroad and to validate the formal and especially informal competences gained during the mobility and using it for finding employment. Two further objectives of the project are building networks between mobility organisations and companies in the tourism sector. This is to raise awareness with the employers for the special competences gained by young people who made the experiences of a mobility abroad and to finally ease the transition of young people into employment after a mobility. An additional action of SYMPATIC to reach these goals is to work with companies to help them build sustainable onboarding structures through a tutor.

The tourism sector was chosen as context for the piloting of SYMPATIC activities and this chapter will shed light on the different characteristics of tourism and the touristic sector in the five regions, being part of this project, as the type of tourism in these regions differs from each other and so do the types of businesses related to tourism.

Furthermore, the 5 organisations organizing mobilities all have a long-lasting experience in working with young people and mobilities but approaches design and funding differ from each other.

To develop a common understanding for the next activities this chapter will present briefly all partner organisations and their work with international mobilities as well as the characteristics of the tourism sector in each area.

2.1 France – Marseille

The partner organisation in Marseille - Eurocircle

Eurocircle association is specialised in the international mobility of young people mainly between 18 and 30 years old. Eurocircle offers volunteer missions through several mobility schemes such as the Civic Service and the European Solidarity Corps.

The Civic Service gives young people between 18 and 25 years (and up to 30 years old for people with disabilities) the opportunity to go abroad, both in Europe and other international destinations, as well as in France, to carry out a voluntary mission. International Civic Service allows people to meet new cultures, to acquire new skills useful for personal, educational and professional development as well as for social integration, while committing themselves to an organization that defends the values of citizenship and solidarity. The missions range from 6 to 12 months and can be in very different contexts, such as environment, education for all, promotion of culture or solidarity and social issues. The selection criteria are mainly based on motivation. During their volunteering assignment, volunteers receive a financial allowance each month to help pay for their accommodation, food, transport and travel expenses. A preparation for departure consists of intercultural modules, first aid training (PSC1) as well as civic and citizenship training. A return training course is also set up in order to assess their experience abroad and to accompany them in their future professional projects. Eurocircle places great

importance to parity and social diversity during the selection process, which means to admit young people from different social backgrounds and with varied educational levels (Infrabaccalauréat and suprabaccalauréat).

The European Solidarity Corps is the second mobility scheme that is proposed, which enables a voluntary commitment to serve the general interest within an organisation in Europe. It concerns young people between 18 and 30 years old and the selection is also mainly based on motivation and not on diplomas or level of foreign language. This scheme enables young volunteers to open up to another culture, to encourage the learning of a foreign language and to develop both professional and personal skills through the diversity of the missions offered. There are also several mission themes depending on the organisations hosting these volunteers, with, for example, activities, environmental awareness, sport or cultural and artistic activities. Within the framework of this system, there are two types of ESC: short-term and long-term. The short-term course can last from 15 days to 2 months and the long-term course from 2 to 12 months. Volunteers receive an allowance for food, free social protection, pocket money, a lump sum for travel expenses and free accommodation provided by the host organization. Eurocircle also offers the European Solidarity Corps programme in the context of professional internships in companies abroad

Marseille and the Local Economy

With its 869,994 inhabitants and 1.8 million inhabitants in the Aix-Marseille Provence metropolis in 2019, Marseille is today the second largest city in France after Paris.

Located in the south of France, its geographical proximity to the Mediterranean Sea (57 km of seafront) and its sunny climate (about 300 days of sunshine per year) attract many tourists and allows outdoor leisure businesses to develop with ease. The Phocæan city which has been founded more than 2,600 years ago, is thus the oldest city in France with a rich historical and cultural heritage.

The tourism sector in Marseille has developed considerably in recent years, particularly since its election as European Capital of Culture in 2013, European Capital of Sport in 2017 and the the decision for Marseille to host the sailing events during the 2024 Olympic Games. The Marseille Tourist Office explains in its 2018 report that the number of tourists has risen from 3 million in 1998 to 5 million 20 years later. The increase in the number of cruise passengers is notably enabling the development of the tourism sector in Marseille, with more than 1.7 million cruise passengers in Marseille in 2018 according to INSEE.

In the department of Bouches-du-Rhône where the city of Marseille is located, the rate of regular employment increased by 1.4% in 2019 from 817,295 jobs in the 4th quarter of 2018 to 828,479 in the 4th quarter of 2019. The PACA region recorded an increase of 1.3% in 2019 with 1,881,212 salaried jobs in the 4th quarter of 2019.

The unemployment rate in Marseilles has been estimated at 10,9% in 2019, i.e. 1.1% higher than in the PACA region, which records 9.8%. However, the unemployment rate remains stable in Marseille in 2019 and does not show a significant increase according to the partnership observation report of the 3rd quarter 2019 on economic situation in the PACA region made by the Observatoire des métiers. The latest reports from the Pôle Emploi institutional job search

scheme in the PACA region show a 5% drop in registrations in the 3rd quarter of 2019. The duration of registration has thus slightly decreased from 369 days to 333 days. For young people under the age of 25, the drop is equivalent to two weeks less than the average recorded for this group in 2019.

Concerning the unemployment rate of young people in the Aix-Marseille Provence metropolis, the report drawn up by the DIRECCTE PACA in the third quarter of 2019 shows a very slight drop between the third quarter of 2018 and that of 2019 for those under 25 years of age. Nevertheless, disparities remain in youth unemployment rates in Marseilles depending on the neighbourhood. The *Mission Devenir Report* of the Aix-Marseille-Provence Metropolis and the Bouches-du-Rhône Department Council published in 2018 counted 40% of unemployed young people from the northern districts of Marseille.

The employment and autonomy of young people in the PACA region and particularly in the city of Marseille remain very limited according to the INSEE report "Les jeunes de Provence-Alpes-Côte d'Azur: quand la vie adulte se fait attendre" (Young people in Provence-Alpes-Côte d'Azur: when adulthood is overdue) carried out in 2016 and published in October 2019. The recruitment rate remains lower than at national and regional level for the city.

According to the report *REGIONAL INVESTMENT PACT IN THE SKILLS* a strong and shared ambition 2019-2022, "64 per cent of young people are in employment three years after leaving the education system in Provence-Alpes-Côte d'Azur (67 per cent in France); this proportion is only 55 per cent for those with a baccalaureate, 57 per cent for those with a CAP-BEP and 35 per cent for those without a diploma". Difficulties in professional integration are thus noted in connection with the level of qualification of young people but also with the specific nature of higher education, since "graduates with a vocational or technological baccalaureate have better integration than those with a general baccalaureate".

The tourism sector in the Marseille region includes several sub-sectors of activity such as the gastronomic world, the business tourism (Congresses, symposia, seminars), hotel business, cultural events/places (museums, theatres, shows, festivals etc), the sub-sector of tourist transport (Marseille airport, Friuli Maritime shuttles), outdoor leisure activities (guided tours by bike or boat, diving, climbing, kayaking etc) and nautical tourism (cruise, boat, natural parc of the Calanques).

As part of the SYMPATIC project, Eurocircle will approach the catering and hotel service professions, which remain the most influential sectors in Marseille. Culture is also one of the city's strong points thanks to the recent dynamics the city has experienced. Because of this also cultural organisation such as cultural centres, festivals and museums will be approached in the framework of SYMPATIC. Outdoor leisure businesses also develop a lot during the summer season and can also be an interesting sector, particularly in the nautical and aquatic field.

2.2 France - The Region Hauts-de-France

The SYMPATIC partner organisation in Roubaix is ADICE. An organisation experienced in international mobilities. For the project activities ADICE defined the geographical area that they will work in for the project as the region Hauts-de-France, which is located in the north of

France, and according to the CCI's (Chambre de Commerce et d'Industrie) 2017 report about key data on the Grand Lille, the number of inhabitants in that year was of around 6 million, which makes it the third most populated region in France right after Ile-de-France and Auvergne-Rhône Alpes.

The Partner Organisation in Roubaix - ADICE

ADICE works primarily on behalf of young people between the ages of 18 and 30 who have encountered problems in gaining access to employment; often they are also experiencing social and/or economic problems and may be discriminated against in hiring because of their ethnic origin or some other factors. ADICE offers them a chance to participate in European and international mobility programs, which will enable them to develop social skills (open-mindedness, independence, critical thinking, solidarity, self-confidence), vocational skills (teamwork, technical and language skills) and intercultural skills (learning about a new country, a new environment, accepting differences, getting rid of stereotypes, sharing this experience back home, being open to other lifestyles).

ADICE's objective is to make mobility a tool, a means of improving the employability of young people. ADICE believes that mobility is an opportunity to learn and grow that will enrich participants' values and resources and enable them to acquire useful skills for implementing their personal and career plans. From this standpoint, mobility is an advantage in accessing employment: independence, initiative, responsibility, a sense of organization, open-mindedness, etc., are all important general and multidisciplinary skills in employers' eyes. Mobility also draws upon essential values like commitment, solidarity, trust, and cooperation.

Hauts-de-France and Economy in the Region

The Hauts-de-France region is located in a privileged zone of France and the region comprehends five French departments (Nord, Pas-de-Calais, Oise, Somme and Aisne). In 2017 Hauts de France was responsible for 6,9% of the French GDP with makes it the fourth (together with the Provence-Alpes Côtés d'Azur region) in terms of its share of the national figure. Even though unemployment is one of the highest rates in France which can be explained with the immense de-industrialisation processes in the economy of the region. The general unemployment in the first quarter of 2020 was at 9,6%. A positive trend could be seen as unemployment dropped from 11,2% since 2018, when youth unemployment was at 27,9%.

Still the industrial sector plays a key role in Hauts-de-France. It represents over 20% of employment although due to a continued decline in the number of employees since 2014, the industrial sector is no longer the region's largest employer, losing this position to wholesale and retail trade, transport and accommodation as finds Eurostat 2019.

But tourism becomes also increasingly important in the region and the type of practiced tourism vary among the Départements. The department of Oise scores highly on the rates of sports and leisure, when compared to other departments, and at the same time, Nord, Pas-de-Calais and Somme have high rates on the category of cultural heritage, due to the elevated number of museums, historic monuments and spectacles in the zones. The seashore and the green

tourism are also of a high importance in the region, as well as the historical tourism, in the largest urban concentration, the metropolis of Lille. According to FAFIH's, Fond National d'Assurance Formation de l'Industrie Hotelière, report, in 2017, there were 9,1 million overnight stays in the region in that year, of which 25% are represented by foreign tourists, distributed as follows:

Country of Nationality	%
United Kingdom	27%
Belgium	18%
The Netherlands	11%
Germany	8%
Other European countries	23%
America	6%
Asia	6%
Africa	1%

Source: MEL (2018)

According to INSEE's (France's national statistics institute) report published in 2017, approximately 70 000 work placements were created in the tourism sector in the region in order to fulfil the growing number of tourists in the area. These rates on the tourism sector correspond to 3.4% of the total employment rate in the region of Hauts-de-France. These placements are distributed in the categories listed below:

Category	%
Lodging	22,10%
Restaurants, cafés	25,60%
Sports and Leisure	12,50%
Heritage, culture, tourist offices	10,50%
Others (commerce, artcraft, ...)	29,30%

Source: Insee (2017)

As reported by the present analysis, almost half (47,7%) of all the job positions studied are catering (25.6%), followed by lodging (22.1%) in Hauts-de-France. It is important to mention that more than half of the jobs in these two categories are concentrated in the "Nord" department, where the metropolis of Lille is located, considered the urban space that attracts most of the tourists in the region. According to national studies, these two categories correspond to an average of 57% of tourism jobs, when all French regions are taken into account, which demonstrates that in the region of Hauts-de-France the tourism jobs are more dissipated, allowing young employees to engage not only on both dominant categories but also in fields like sports, culture, leisure.

2.3 Italy – The Region Lombardy

Ciofs-FP is a large Italian provider of VET courses with a network all over Italy. The SYMPATIC project activities are taking place in the region of Lombardy

The Partner Organisation in Italy – Ciofs-FP

CIOFS-FP is a non-profit association and operates in 12 Italian Regions through its Local Boards with about 70 Operative Centres. The Association covers a good number of activities such as: vocational training, orienting, services to local enterprises and particular needs. It provides training, workshops, transnational exchanges, research and work-oriented services. Adolescents, youths, women, unemployed people, migrants, dropouts, are the beneficiaries of such activities. The main beneficiaries are youth, dropout, women, unemployed, NEETs, migrants, Roma people and other minorities. It trains about 17.000 trainees (both boys and girls) each year, including Youth having a migrant background and at risk of early school leaving. The National Centre is located in Rome. Its main tasks are co-ordination, teachers training, supply of technical and project aids. The C.I.O.F.S.-F.P. Lombardia (Italian Center for Salesian Women's Works - Vocational Training - Lombardy) is a non-profit association, established on November 8, 1977. With its Centers in Castellanza (VA), Cesano Maderno (MB), Cinisello Balsamo (MI) , Milan, Pavia and Varese, operates in the field of vocational training (IeFP), first and second level apprenticeship, continuous and permanent training, higher education, orientation, certification of skills and services at work.

It is an integral part of a set of Regional Associations coordinated by the National Association C.I.O.F.S.-F.P., which in turn is part of a wider associative system: that of the C.I.O.F.S., an institution promoted by the Institute of the Daughters of Mary Help of Christians ("Salesians").

Lombardy and Economy in the Region

Lombardy is one of the twenty administrative regions of Italy, in the northwest of the country. About 10 million people live in Lombardy, forming more than one-sixth of Italy's population, and more than a fifth of Italy's GDP is produced in the region and with a GDP per capita about 26% higher than the national and the EU average. The metropolitan area Milan is the largest in Italy and the third most populated *functional urban area* in the EU. Lombardy is also the Italian region with most UNESCO World Heritage Sites which make a big part of the touristic value of the region.

A wide variety of industries characterises the economy of Lombardy as it ranges from traditional sectors, such as agriculture and livestock to heavy and light industries. The service industry has also had a strong development in the recent decades. The production system of Lombardy is still one of the most developed in Italy and Europe: at the end of 2016 there were 74 enterprises per 1000 inhabitants, one of the highest rates of entrepreneurship in Europe. SMEs dominate the market and from a shareholding point of view most businesses are family owned, with the exception of few very large firms. The main sectors are: mechanical, electronics, metallurgy, textiles, chemicals and petrochemicals, pharmaceuticals, food,

publishing, footwear and furniture. The service sector is also very developed and mostly related to international trade and financial services. The Italian Stock Exchange, one of the main European stock markets, is based in Milan, and the Milan Trade Fair is the largest exhibition space in Europe. In the recent past, also the touristic industry highly increased its share on contribution to the regional GDP. The regional unemployment rate in 2019 was at 6% (Eurostat), which is far below the Italian and European average (10.6% and 6.9% respectively) although the youth unemployment rate in 2019 in Lombardy was at 18,2%.

2.4 The Republic of Cyprus

The Partner Organisation in Nicosia – EDITC

EDITC is a vocational training centre based in Nicosia and regularly works with young people going on mobilities and with companies in Cyprus receiving young international workers. Over the years, EDITC has implemented numerous projects (more than 15) under government contracts (HRDA- Human Resource Development Authority) for the placement of unemployed people, economically inactive women and unemployed youngsters for a period of 8-10 weeks in jobs in various sectors to acquire skills and competences. The placements were carried out for people living in Cyprus. The placements involved

1. matching of potential participants with companies: Consultants were responsible for interviewing the candidates, to learn about their academic qualifications, their interests, skills and wishes in regard to employment.
2. The consultants created a pool of more than 300 potential companies (SMEs and large) who could accommodate candidates for a period of 8-10 weeks in order to gain work experience in the field of their choosing. It should be noted that the candidates' requests for employment ranged from truck drivers to kindergarten assistants to secretarial etc
3. Following the matching, and for the placement to start it was essential to identify a mentor with a minimum number of years working experience who would have the time and will to mentor the participant.
4. In collaboration with the mentor a training plan was drafted, and objectives were agreed. This training plan was subjected to the approval by the HRDA.
5. During the 8-10 weeks period, a consultant would do 2 hours visit to the workplace (once a every 2 weeks) to discuss possible issues with the participant and the mentor, monitor the progress of the program, and to ensure that objectives are achieved.
6. At the closure of the placement the consultant creates a report with the findings and the participant evaluated the placement experience.

A similar process was followed during a recent project which aimed to train 400 people on Sales. The program was followed by a 1-month placement to a sales position. This project was completed successfully in 2019.

EDITC is currently working with a Polish partner for a Polish national project where Polish youngsters will be placed in the Hospitality and Tourism Industry in Autumn 2020. It is foreseen that a similar process will be implemented as described above.

Cyprus and the Economy on the Island

The region that SYMPATIC activities will take place is the whole part of the island of Cyprus south of the Green Line, mainly focusing on touristic areas of the island such as Protaras, Ayia Napa, Larnaca, Limassol and Paphos. Cyprus is a divided country since 1974 due to the Turkish invasion and the non-occupied part of the island has approximately 800 000 inhabitants.

The tourism in Cyprus plays a dominant position in the economy and it significantly impacts Cyprus culture and its multinational/multicultural development throughout the decades. In 2006, the tourism industry contributed 10.7% of the GDP which corresponds to a total of US\$ 5445 mn. Tourism Revenues in Cyprus averaged 162233.35 EUR Thousand from 2001 until 2020, reaching an all-time high of 431600 EUR Thousand in August of 2019. In 2019 the tourism industry had a share of 22,7% of the Cyprus GDP.

Cyprus is the 40th most popular destination in the world and the last 4 years have been a triumph for Cyprus tourism, each year breaking past records. In 2018 Cyprus was visited by 3.9 million tourists, the highest number ever recorded in the island's history. Cyprus attracts tourists mainly for their summer vacations due to the weather and nice beaches, although the current and previous governments are working towards improving the touristic product by developing for example health and cultural tourism.

Tourism is one of the main economic sectors of Cyprus' economy, and therefore the government and other key stakeholders place a lot of emphasis on the promotion and quality of the touristic product.

Regarding unemployment, the unemployment rate in Cyprus in 2019 was 7,27%, which has severely decreased following the 2013 economic crisis in Cyprus (bail-in and closure of banks). The Youth Unemployment Rate in Cyprus remains quite high at 15.64 % in 2019.

The Cyprus partner will focus on the Hospitality and Tourism industry. Specifically, we will be targeting hotels, restaurants, coffee shops and pubs, car rental companies, souvenir shops, scuba diving centres, cultural centres and other companies offering goods and services to the tourist sector.

2.5 Germany – The Land of Berlin

The Partner Organisation in Berlin – u.bus

u.bus has a longtime experience in organising transnational mobility projects for young unemployed people. In 2015 u.bus GmbH has been commissioned by the Federal Ministry of Labour and Social Affairs to implement the Job Destination Europe project. Since then the project - together with its regional and European partners - has been enabling young unemployed people in Berlin to prepare for future training or employment during a several-month internship in European metropolitan regions (France, Netherlands, Sweden, Poland, Austria).

The project is financed by the Federal Ministry of Labour and Social Affairs with funds from the European Social Fund (ESF Integrationsrichtlinie) and the State of Berlin. The aim of the ESF Integration Directive is to integrate people with special difficulties in accessing work or training

into the labour market. The projects of the Integration Directive are implemented in cooperation with the regional labour administration (job centres/employment agencies) with the active participation of companies and public administrations.

The Land of Berlin and the Local Economy

Berlin, the federal capital, has about 3.5 million inhabitants, making it the largest city in Germany and the most densely populated federal state. There is an average of 3 950 residents per square kilometre. Berlin is completely surrounded by Brandenburg and is approximately 70 km from the Polish border to the east.

The number of jobs subject to social security contributions rose with respect to the previous month according to the preliminary, seasonally adjusted, extrapolated data of the Federal Employment Agency. Without seasonal adjustment, the number of jobs subject to social security contributions in January 2019 was 1 503 400. In the year-on-year comparison between sectors, the predominant picture in Berlin was of growth across the board. The agriculture, forestry and fishing sector saw the highest increase, with growth of 20.8 %. In Berlin, the biggest drop was recorded in the sector of temporary work (-2.7 %).

At the same time the unemployment rate in Berlin was 7.9 %. Without seasonal adjustment, unemployment in February 2019 fell compared to the same month last year by around 12 200 or 7.4 % to 153 100 in Berlin. Compared to the same month last year, male unemployment in February 2020 fell by 7 300 or 7.7 %, whilst female unemployment fell by 4 800 or 6.9 %. The proportion of unemployed women in the reporting month was 42.8 %; in the same month last year it was 42.6 %. Youth unemployment in 2019 was slightly higher and was at an average of 8,4%

The number of reported available jobs in February 2019 rose by 3 300, seasonally adjusted, compared to the previous month, after a seasonally adjusted rise of 600 in the previous month. Without calendar adjustment, the number of jobs in February is 30 300. Year on year, this represents an increase of 5 700 or 23.0 %.

The changes in entrants are a better indicator for businesses' willingness to hire than the changes in existing numbers. In the seasonally and calendar adjusted previous month comparison, the number of reported jobs in February 2019 increased by 2 000.

Without seasonal and calendar adjustment, 10 300 jobs were newly reported in Berlin in February, an increase of 2 300 or 28.0 % compared to the same month last year.

3 The Tourism Sector in the Project Regions

This chapter looks more in detail at the characteristics of the types of tourism in each context and on the types of businesses that are active in the sector and profit from tourism. It also gives as far as available some overview of the labour market situations and working conditions of the sector. In the following, each regional report includes an overview of the formal training opportunities that aim at professions in the tourism sector.

3.1 France – Marseille

France is one of the most visited countries in the world, and tourism generates a turnover of more than 60.7 billion euros in 2017 according to the World Tourism Organization. Every year, the country sees an increase in the arrival of visitors, particularly in the South of France. In 2018, the Provence-Alpes-Côte d'Azur region estimated that the revenue attributed to the tourism sector would amount to 20 billion euros, or 13% of GDP. There are several sub-sectors of tourism: Restaurants-Hotels, transport, leisure and culture.

The hotel industry saw its international clientele increase in 2018 with a progression notably in luxury hotels. Marseille is thus placed in first place among the cities in the region with the most overnight stays, with 1,934,000 overnight stays for 2018. Outdoor hotels such as camping sites (282,075 beds in 2018) or holiday villages and youth hostels (46,784 beds).. According to the 2018 report from the Marseille Tourist Office, hotel activity is on the rise and the city of Marseille is in third place among French cities after Bordeaux and Lyon.

There is also the transport sub-sector, which enables the reception and transport of visitors to Marseille. Marignane International Airport has welcomed more than 9.4 million passengers, which represents an increase of 4.3% in 2018 and the investment of 42 million euros allows the extension of the structure and employment opportunities. The maritime transport sector, which is one of the specific features of the city of Marseille, is progressing and will welcome more than 1,715,000 passengers in 2018.

Marseilles has for several years now developed its business tourism with an increase in the organisation of seminars (2014: 340 vs. 2018: 399), colloquia (2014: 26 vs. 2018: 44) and congresses (2014: 96 vs. 2018: 214). In 2018, 30% of passengers arriving in Marseille also came for professional reasons, with 85% coming from France and 15% from abroad. The city has notably developed the "Plan Marseille attractive 2012 2020" to boost employment and make it a "business centre and exchange platform of Southern Europe" according to the "Bilan de la saison touristique à Marseille et dans la métropole Aix-Marseille Provence" (Assessment of the tourist season in Marseille and Aix-Marseille Provence metropolis).

Urban tourism is also one of the strengths of the city, which offers more and more cultural events such as festivals, exhibitions, concerts and sporting events. The city of Marseille has also strengthened the presence of its cultural venues with the construction of the MUCEM in 2013, which increased from 413,747 visitors in 2017 to 501,342 in 2018. Visits to the Musée de la Vieille Charité also exploded, rising from 93,650 visitors in 2017 to 249,447 in 2018. The increase in the number of programs and events also makes the city very attractive to tourists. The programming MP18 What Love in 2018 has thus brought together nearly 256 projects and 680 events throughout the year. The attendance rate was 1,220,000 people and more than 500 cultural operators and 1,600 artists participated in the cultural program. According to the INSEE report Emplois culturels - La palme pour Provence-Alpes-Côte d'Azur published in 2017, the cultural fabric is particularly important in the region but most establishments are small structures with few employees. However, the audiovisual, heritage and advertising sector is „one of the biggest employers in the region“, with theatres, museums and spectacles being among the most successful.

Regarding the employment in tourism sector, there has also been an increase in job offers in the PACA region with more than 151,000 offers in the 4th quarter of 2019. At the same time, there has been an increase in the number of jobs in the tourism sector in the Bouches-du-Rhône region, with approximately 50,000 jobs created per year according to data from the Département.

Tourism in the PACA region mainly generates seasonal activity with salaried jobs that vary "between 82,000 in the low season (October/November) and up to 160,000 in the summer period" according to the Zap Tourisme PACA 2018/2019 report. The majority of jobs in the tourism sector are concentrated around tourist accommodation and catering. According to the URSSAF PACA statistics, accommodation and food services remain the sub-sector that employ the most people in the tourism industry in Marseille in the 3rd quarter of 2019 too.

The research on the Pôle Emploi job search site show that the most popular jobs in the tourism sector for recruitment projects in Marseille are restaurant service staff, kitchen staff, artists, socio-cultural instructors and professionals working in the entertainment and cultural sectors. It is interesting to note that during the year 2019, the city of Marseille has put the spotlight on gastronomy by offering a programme spread out over the year to highlight the kitchen and its professions. There are a multitude of occupations related to the tourism sector, but the job offer varies greatly depending on the sub-sector. These include waiters in cafés/restaurants, cooks, sports instructors for nautical/aquatic or socio-cultural activities, entertainment professionals, hotel employees, guides/lecturers, on-board hotel staff (cruises), beach staff, travel agency agents, as well as tourist reception staff in transport or the Tourist Office.

Our research did not allow us to have access to precise data on the profiles of employees in the tourism sector in Marseille. However, the reports of the Regional Observatory of Trades and the French National Employment Agency allow us to better identify the type of profile in the PACA region. The professions in the tourism sector are mostly part of the face-to-face services of the economy, accounting for 43% of the region's employees. Among the rate of employees working in these services in the PACA region, we find restaurants in 6th position, accommodation in 7th position, leisure and sports activities in 13th position, travel agency activities in 16th position and finally museums and other cultural activities in 17th position. In the restaurant sector, there is a higher rate of young employees (48%) as well as in sports/recreational and leisure activities (36%). According to the report, "people with little or no education are over-represented, especially among senior citizens, but the differences in educational attainment between young people and senior citizens are also more marked than average".

With regard to types of contract, although the majority of employees are on permanent contracts, fixed-term contracts (fixed-term, casual work, assisted contracts) are nevertheless more frequent in these services. 90% of employees start their work on fixed-term contracts. Tourist professions are also more exposed to seasonal contracts, such as in the restaurant and hotel industries.

According to the synthesis of Pôle Emploi on the employment area in Marseille in 2019, many jobs of tourism sector in Marseille are also seasonal (23% of total job offer), such as waiters in restaurants (63% of seasonal employment in Marseille), sports instructors specialising in nautical and aquatic activities, cooks (62%), kitchen helpers/apprentices/teachers (39%), hotel

employees (73%), entertainment professionals (39%) and socio-cultural instructors (62%). Catering-related jobs (service and cooking) are also considered to be under pressure because, despite the supply, employers have difficulty recruiting due to a lack of candidates with experience or the right motivation.

Working conditions in tourism-related jobs are also often difficult because the service requires many hours and the ability to manage a certain amount of pressure. The issue of employment conditions and low wages is also raised, particularly in the restaurant and hotel sector. For example, there are more resignations in the catering and sports and leisure professions. There are also difficulties in hiring, according to employers in the hotel and catering industry. This shows that the dynamics in employment in these professions can be slowed down. It also seems necessary to improve "access to training and retrain the workforce and to secure seasonal jobs and improve the quality of services," according to the report.

Study programs in the tourism sector according to sub-sectors.

In the field of catering and hotel management we find in particular the Lycée Hôtelier de Marseille, the Institut La Cadenelle, the GRETA CFA Marseille, the Tunon School and the International Hotel Management School. Most of them offer Professional Baccalaureate, BTS, CAP and specialised training in cooking, pastry making, catering, hotel service, barman and sommelier.

In the cultural sub-sector, the studies are more university-based with Bachelor's and Master's degrees in the field of cultural mediation, cultural project management and cultural studies.

For the studies in the field of Tourism Management, the BTS are prevalent in several establishments such as the Cours Diderot, the Institut La Cadenelle, the Lycée Charles Peguy, the hotel school of Marseille, the Tunon school and the ICF of Marseille. There are also more university courses with a professional Bachelor's degree in tourism professions: communication and promotion of territories and a second one on the marketing of tourism products.

Finally, in the field of cultural and sports activities, it is the BPJEPS diplomas¹ that give access to these professions. There are several of them in Marseille with specialities in nautical, aquatic, hiking, leisure, cultural and heritage activities for the general public.

In the catering sector the skills to be acquired include: willpower, sense of responsibility, mobility and availability, courtesy, human relations, impeccable presentation, fighting spirit and good stamina.

The subjects of apprenticeship depend on the concerned profession (kitchen, waiter, barman, receptionist).

Cooking: professional cooking techniques, culinary production, production organisation, communication and marketing in catering, safety & hygiene, foreign languages and team management.

¹ Stands for brevet professionnel de la jeunesse de l'éducation populaire et du sport. It leads to jobs such as animateur for children and young people, it can be translated as VET diploma (2 years) which is in the same level of the high school diploma Baccalauréat.

Catering service (waiter, barman, reception/reception): commercial communication, customer relations, computer skills, good general knowledge, excellent presentation, knowledge of beverages, language skills, accounting/financial/fiscal management and safety & hygiene.

The skills to be developed in the hotel sector include: receive/listening/understanding customer expectations, sense of service, autonomy & initiative, ease of integration, curiosity, organization and teamwork.

The learning subjects are mostly oriented towards: foreign languages, written and oral communication, hotel management, economics, science and technology in accommodation service, personnel management, intercultural management, commercial and marketing management, accounting, financial management, knowledge in catering service, hygiene and safety and general culture.

For both sports and cultural leisure activities, the apprenticeship is based on the organisation and presentation of sports/cultural activities, team management, welcoming the public, customer relations, mobilising popular education approaches for the activities, mastering animation techniques specific to one's field of activity (nautical, aquatic, cultural, heritage), foreign languages, building an animation project and having an interest/knowledge for one's field of activity.

Cultural and event studies include foreign languages, communication, event creation, project management, accounting & financial management, analysis of policies put in place for the public, design/conduct mediation operations to raise public awareness of art and culture, organisation and monitoring of cultural actions, mediation watch and team coordination.

Finally, for professions related to tourism management and marketing, the learning paths work on the development of linguistic skills, cultural skills (linguistic tourism, history of countries/territories, sociology and media), marketing and commerce, tourism customer relations, tourism services, tourism information management, general culture, sustainable development and written and oral communication.

These professions also require certain skills such as a taste for exchange, adaptability, autonomy, ability to integrate new technologies, dynamism, mobility and versatility.

3.2 France - The Region Hauts-de-France

According to FAFIH's, Fond National d'Assurance Formation de l'Industrie Hotelière, report, in 2018 there were 13.150 touristic establishments in the region of Hauts-de-France, which comprehends around 6,3% of all touristic facilities in a national level. The report presents data on the legal reality of the employees working on these establishments, concluding that in almost half of them (N=6.421) the employees are not working under full-time contracts. The rest of the establishments (N=6.729) in the region, that indeed hire under full-time conditions, count on a low number of staff under such type of contract, 86% of them (N=5.791) are composed by less than 10 full-time employees.

FAFIH's report also provides the results of an interview made with employers of the sector, to describe the positions they would probably require staff for the following year. The total number of offers should be around 11.031, and as the number of seasonal contracts in the region is

high, employers were also required to mention the percentage of seasonal positions among the total number of offers disclosed. The results can be observed in the table below:

Position	Estimated number of open positions	% of seasonal contracts among them
Kitchen helpers and apprentices, multi-skilled catering employees	4 499	24,5%
Waiters in cafés and restaurants	3 503	44,0%
Cooks	1 584	36,0%
Hotel employees	893	63,0%
Chefs	373	9,5%
Hotel maîtres	91	13,0%
Executives in the hotel and catering industry	51	42,00%
Hotel Management	37	67,00%
Total	11 031	37,00%

Source: FAFIH (2018)

The staffing needs reflected the increasing employment rates on the lodging and catering categories within the tourism sector in the region of Hauts-de-France. The number of seasonal contracts demonstrates the reason why almost half of the employees in the tourism sector are not under full-time conditions, and it makes it an appealing region in France for young people willing to enter the labour market during high seasons.

In 2018, FAFIH's findings confirm that there were 41.681 full-time employees in the tourism sector in Hauts-de-France, equivalent of 5,6% of all full-time employees in this sector in the national level, in France. As mentioned before, the category with the greatest employment rates in the tourism sector is catering, and the same applies to the full-time employees described; half of them are working in traditional restaurants and cafés in the region. Concerning legal hiring conditions, it is also important to remark that during 2018's summer, there were almost 14.000 open positions for seasonal contracts, in addition to the employees already taken in account, followed by 4.000 during the winter season.

Considering the data displayed previously, multiple job offers within the tourism sector in the region of Hauts-de-France have been analysed in order to understand the demands of the market towards young workers. We have used four different job search online tools (LinkedIn, Indeed, Pôle Emploi and Profil Culture) in order to take in consideration twenty offers, distributed by different categories within the tourism sector, as follows:

Category within the Tourism sector	N of offers analyzed
Lodging positions	5
Catering positions	5
Sports and leisure positions	5
Tourism administration positions	5
Total	20

For each offer, we have considered the following requirements; education on the tourism domain, work experience, foreign languages fluency, digital competences, motivation and interpersonal skills. The following results take in consideration the twenty analysed offers, however specific considerations will be made afterwards considering each different category;

- 85% of the offers require candidates to have education or training in the tourism sector
- 80% of them require a minimum of one-year experience on the field. We have also explored offers that required four or five years of experience for higher positions
- 25% of the offers requires candidates to speak only English fluently, and 25% of them requires candidates to speak English, in addition to another foreign language (none specifically mentioned). The other 50% of the offers do not require participants to be fluent in foreign languages, as long as they present good communication skills in French
- Half of the offers request explicitly digital knowledge. The other half does not mention it as a requirement although most of them require experience in the field, which demonstrates the need young people entering the labour market have on improving such competence
- Although motivation has not been a wide requirement, 35% of the offers we have analysed defines a motivated candidate more likely to be recruited
- In regard to interpersonal skills, 90% of the offers mentioned key words such as “communicative”, “dynamic”, “excellent customer relations”, “diplomatic”, as characteristics they would highly appreciate on their candidates.

According to FAFIH’s, Fond National d’Assurance Formation de l’Industrie Hotelière, report, in 2017 there were, in the field of tourism, 38 educational institutions (by that we can understand Schools and Universities), and 34 CFA (Centre de Formation d’Apprentis), which would be equivalent to a technical course, adding up to 7494 students in the region. These establishments are distributed in the region as follows:

	Technical Courses		Schools/Universities	
	N of Enrolled Students	N of Centers	N of Enrolled Students	N of Centers
AISNE	206	4	589	6
NORD	1022	14	1968	14
OISE	140	2	346	3
PAS-DE-CALAIS	439	10	1902	10
SOMME	222	4	660	5
TOTAL	2029	34	5465	38

Source: FAFIH (2018)

73% of the 7494 enrolled students belong to educational institutions. These kinds of structures possess the attractiveness of offering a balance between the cooking and hotel and restaurant management. In 2017, 98 students were graduates of the hotel and restaurant management and 34 students have obtained the diploma concerning accommodation.

On the other hand, the other 27% of students belong to CFAs (technical courses). The majority of their courses focus on cooking and service, and do not count on training courses that prepare students for jobs in accommodation. For example, of the 626 apprentices who left CAP institutions in 2017, 352 were prepared for the kitchen field, 202 for the restaurant field, 67 for the brasserie-café services field and 5 for the hotel services field.

3.3 Italy – The Region Lombardy

Relevant research on tourism published in 2018 and 2019 finds that the industry experienced an expansive boom thanks to the increase of spending power and free time demand starting from new emerging countries, able to generate employment for all ages and gender. Globally, the tourism industry is characterized by some medium-term trends, that apply also in Lombardy: globalisation of flows, supply specialization and concentration, digitalisation and disintermediation.

To the quantitative growth of the employment rate it seems not to correspond an accompanying improvement of the degree of alignment between supply and demand of work in qualitative terms and significant mismatch problems persist. The investment in education and competences are essential in a sector like the tourism industry, where human resources play a key role to ensure a high quality of service.

The main areas where companies of the hospitality industry are investing in terms of digital transformation are marketing and communication, online booking, ERP management systems and customer support. Today, web site administration and hotel software management are the most sought-after areas of competences and mentioned as internal shortcomings.

While the gradual disappearance of the old professional figures and in parallel the emerging of new profiles which were non-existent until a few years ago can be seen: it emerges a clear and non-deferrable need of new and stronger professional skills. This entails that companies in the tourism industry identify the educational institutions as key partners for their development.

The study “Work and training needs in Tourism” made by the Bilateral Agency of Tourism in cooperation with the Tourism Studies Centre in October 2018, shows characteristics of the Italian tourism industry and some extracts are presented in the following:

During the 2017, only a quarter of the companies increased the establishment plan, while the 70% remained stable (the 8% reduced employment). A third of the entrepreneurs chose to outsource some services, with several formula, especially to have more profit (60%) but also due to the lack of in-house expertise (19%). A continuous replacement of market and new forms of consumption require the need to integrate and improve the skills of professionals involved. In particular a solid culture of hospitality (reported by the 39% of interviewed), having technical skills (34%) and gaining language skills (32%), computer skills (21%) and the ability to decide (20%). 45% of interviewed pointed out real difficulties in finding staff with the skills described here.

It is given attention to the profiles with specific skills and a strong ability to acquire, read and interpret the information available from the market: marketing manager, social media manager, revenue manager, Customer Care experts, Human Resources experts, etc.

But also the general relationship building with customers is a very mentioned characteristic in concrete this means that employees need the ability to establish a relationship with customers/travellers and are able to communicate efficiently, emphatic and professional, to be able to manage contact during service provision, at the reception and illustration of the territory offers, or during the management of emergency and/or dispute with clientele.

Additionally, foreign language skills are very wanted by employers, in order to successfully interact with customers and other businesses. The most needed languages are currently English, German, French, Spanish, Russian and Chinese.

The study also gives an overview of the most requested professional profiles in the short and medium term and which positions are seen with the highest need of continuous training and for which positions employers experience a skills shortage:

The professional figures on which there is a major request in the short-term are, in order of importance:

- | | | |
|--------------|------------------------|--------------------------|
| 1. Reception | 6. Lifeguard | 10. Waiter |
| 2. Kitchen | 7. Sales and Marketing | 11. Social Media Manager |
| 3. Maitre | | |
| 4. Chef | 8. Sous-chef | 12. Housekeeper |
| 5. Bar | 9. Management | |

In the strategic planning of the medium/long-term, companies hypothesize that the most wanted professionals/skills will be, in order of importance:

- | | | |
|---------------------|------------------|----------------|
| 1. Online Marketing | 5. Reception | 9. ICT |
| 2. Parlour maids | 6. Manager | 10. Secretary |
| 3. Room waiters | 7. Director | 11. kitchen |
| 4. Bar/café | 8. Communication | 12. Commercial |

The following shows the need seen by employers to retrain the personnel in the tourism sector but mainly in restaurant business and hotel facilities. Requests differs regarding the contents about the re-training of the personnel. The positions that most need further training are, in order of importance:

- | | | |
|-------------------------|---------------------|--------------------------------|
| 1. Reception | 5. Chef | 10. Administrative
employee |
| 2. Administration | 6. Sous-chef | 11. Sales and
marketing |
| 3. Management | 7. Restaurant staff | 12. Lifeguard |
| 4. Reception
Manager | 8. Maintenance man | |
| | 9. Waiter | |

Although the market is growing, companies operating in the tourism industry keep dealing with several difficulties in finding personnel, proportionally with dynamics of the sectors.

The figures reported to have more difficulties in finding workers are, in order of importance:

- | | | |
|------------------------|----------------|-----------------|
| 1. Chef | 5. Waiter | 9. Kitchen |
| 2. Sales and Marketing | 6. Cleaning | 10. Busboy |
| 3. Restaurant staff | 7. Reception | 11. Floor staff |
| 4. Night watchman | 8. Maintenance | 12. Housekeeper |

In addition to the challenge that employers see a skills shortage for certain positions (mainly for highly qualified positions such as sales and marketing and on the other hand for rather low qualified positions such as watchmen or busboys) employers find that the relation with the education system is quite difficult, as it doesn't prepare the graduates well for the work in the sector and many need basic training courses within the businesses to allow a fast integration in the professional context.

3.4 Republic of Cyprus

According to the statistics available for 2019 by the Statistical Service Department in Cyprus 3.976 million tourists visited Cyprus with a turnover of the sector of approximately 431.600.000 EUR.

The distribution of employment in Cyprus by economic sector from 2009 to 2019 was 2.47 % of the employees in Cyprus were active in the agricultural sector, 16.95 % in industry and 80.59 % in the service sector.

The share of part-time employment to total employment was 11.2% or 45,644 persons (males 8.1%, females 14.6%). The corresponding rate for the fourth quarter of 2017 was 12.7% (males 9.2%, females 16.4%).

According to the statistical service 86.7% or 353,001 of the total employed persons were employees, of which 12.5% (43,944 persons) had a temporary job. In the corresponding quarter of 2017 employees accounted for 86.8% of total employment of which 14,8% had a temporary job.

According to statistical data of 2016 42.9% (150780 persons) in the work force in Cyprus are employed in the tourism sector in the following categories:

- Food and beverage services 22%
- Accommodation Services 18.5%
- Travel Agencies and other 1.8%
- Other Accommodation services 0.6%

The top professions in the tourism industry today are

1. Hotel Cleaners
2. Receptionists
3. Waiters
4. Bartenders
5. Kitchen Assistants

Before the corona crisis a lot of openings were published in the tourism sector in the above-mentioned professions for seasonal employment, but it is expected that the Covid-19 pandemic will negatively impact the job offers.

The special situation in Cyprus is that many of the jobs in Cyprus offered in the tourism sector are not preferred by the locals as they are considered “low” with not favourable employment terms (working in shifts, long hours or low salaries). Therefore, the tourism sector is powered by EU nationals especially from countries where the salaries are lower than salaries in Cyprus. A big share of these international workers in the tourism sector are EU Nationals ranging from 23-55 years of age. A lot of employees in the tourism sector are from Poland, Romania and Bulgaria. There is also a part of non-EU workers from countries such as Russia and Ukraine.

The tourism industry is powered by both permanent and seasonal staff. Unfortunately, the tourism in Cyprus is not steady throughout the year. Hotels open in March or April and close end of October. Although the government is pushing for a bigger touristic

season, there are still a lot of things to be done in order to reach the target. Cyprus is trying to improve its touristic product and not rely only on the sun and nice beaches in order to attract tourists throughout the year. Therefore, a big percentage of the people employed in the sector are temporary (full and part-time) employed staff which is terminated end of the season and is re-employed at the beginning of the season. During the “idle” period they get unemployment benefits.

The working conditions in the tourism sector vary and this is dependent on the employer. Although the vast majority of the employers abide to the legislation in regards to employment, hours, minimum wages etc. these are compared to other professions less attractive, at least to the local population that prefers other kind of jobs such as office jobs, where conditions are more favourable (mostly working hours are better, not necessarily the salary).

Formal Education Courses

There is a wide variety of courses in formal education leading to diplomas and degrees in the tourism sector. In Cyprus exist several colleges and 5 universities (3 private and 2 public) who offer tertiary education on tourism (such as Hospitality Management, F&B Management) etc.

Diplomas offered by colleges are:

- Gastronomy
- Hotel Management
- Travel and Tourism Management
- Management of Food and Beverage Companies

The courses include topics which cover mostly hard skills and some soft skills but not transversal skills such as:

- Health and Safety
- Professional English
- Applied Mathematics
- Food and Beverage Service
- Applied Computer Science
- Storage and Conservation of Supplies
- Career Development
- Introduction to the Traditional French Cuisine
- Cookery (Theory & Practical)
- Bakery / Confectionery Techniques
- Food Hygiene and the Environment
- Quality Assurance, Costing and Purchase of Food
- Nutrition and Diet
- Entrepreneurship
- Conference and Events Management



Additionally, there are a lot of courses (non-formal training) which focus on the development of transversal skills and soft skills which are required in many professions in the sector such as

- Time Management
- Communication
- Body Language
- Social Skills

3.5 Germany – The Land of Berlin

The tourism and congress industry are an enormous economic factor for Berlin: the gross revenue generated by visitors to Berlin has increased by around one billion euros to 11,58 billion Euro per year over the last two years. Each overnight visitor to Berlin spends 205,80 Euro a day, and congress visitors even 246 Euro.

Numerous industries profit from tourism. The Berlin hospitality industry accounts for 48 % of the city's tourism turnover. Every third euro is spent by guests in retail. The rest - around 20 % - is spent on services such as public transport and event tickets.

With more than 31 million overnight stays in 2016, Berlin will be under the top 3 travel destinations in Europe. For the first time, the number of international guests exceeds the five million mark. Due to the high number of overnight stays in hotels (approx. 31 million), by the additional overnight stays in private accommodation (approx. 38 million) and 109 million day trips, the tourism industry is one of the most important industries in the German capital. Every day, an average of around 500,000 guests stay in Berlin.

The hotel and restaurant industry are the sectors that benefits most, with a turnover of around 5.6 billion euros, accommodation and meals account for 47.9 % of sales. On the retail accounts for 32,3 % of gross sales and 19,8 % of turnover is generated in the service sector, for example by public transport use or entrance fees, generated.

The contribution of tourism to the income in Berlin in 2016 was 5,39 billion euros (see 2014: 4.949 billion euros). 235 000 people in Berlin live purely from tourism (employment equivalent), with a national average income per capita of 22 941 Euro (see 2014: 20,575 euros).

Employees and Working Conditions

Tourism is one of the key industries in Berlin with an annual turnover of € 11,5 billion and an employment effect of 235,000 employees. Nominal sales increase of 3,5 percent compared to the previous year. In real terms, i.e. price-adjusted, this corresponded to an increase of 1,1 percent, according to the Berlin-Brandenburg Office of Statistics.

Throughout Germany, approximately 2 million people are employed in the hotel and catering industry. These include full-time employees, part-time employees and so-



called minijobbers. In fact, it can be assumed that 50% of the 2 million employees nationwide have so-called mini-jobs².

Despite the considerable shortage of skilled workers, pay is generally poor. On average, an employee in this sector earns €11 per hour, which puts his or her salary in the low wage range. In addition, many unskilled workers work in the catering industry, as well as many immigrants from other EU countries, who have a poor starting position for salary negotiations due to a lack of language skills and qualifications. The situation is not easy for vocational training students as well. They earn 750 € per month. However, every second training contract is terminated either by the employer or by the employee.

According to KOFA (Institut der deutschen Wirtschaft Köln), the reason for the increasing shortage of skilled workers is that the demand for system catering specialists in particular is growing: since 2010, the number of reported vacancies has risen from 682 jobs nationwide to 1484 jobs in 2019. That is more than double.

At the same time, there is a shortage of young people: fewer and fewer people are opting for vocational training in the catering industry. The number of applicants reported to the Employment Agency has shrunk from just over 9000 in 2009 to just under 3600 in 2019, which is less than half of what it was in 2009. This is shown by figures from the Employment Agency. In general, the trend in training is declining: Three times as many training places as in 2009 are not filled across all sectors. Working in the catering sector is not considered very attractive because working hours are often long, and employees are paid below average. The average gross salary across all occupations is 3304 Euro per month, while employees in the catering sector do not receive 60 per cent of this on average. (Frankfurter Allgemeine Zeitung 19.2.2020)

In conclusion, it must be said that in the hotel and catering sector the contradiction between the lack of skilled workers and unattractive working conditions has not been resolved.

Formal Education Leading to Work in Tourism Sector

In Germany there are numerous opportunities to complete a vocational training for a profession in the hotel and restaurant industry.

As a rule, these are 2-3-year training courses and are mostly organised in the dual system, which means with a large part of Work Based Learning. Concretely this means that either the theoretical part of the training takes place in block courses over 2-3 weeks at the vocational school and the practical part in the hotel or restaurant takes place en bloc in the other weeks. Alternatively, the dual training can also be designed as follows: two days a week at vocational school, three days a week work-based learning in the company.

² Definition mini-job: In the case of the 450-euro mini-job, the salary may not exceed 450 euros per month. The number of hours that mini-jobbers are allowed to work per month is determined by the hourly wage. Although the statutory minimum wage of € 9.35, for example, also applies to mini-jobs, there are disadvantages in health and social insurance. As a rule, mini-jobbers are not covered by social insurance, i.e. there are no claims to sickness benefit and pension.



Here are a few examples of recognized training occupations:

- Assistant - hotel management
- Skilled worker - Hospitality industry
- Specialist - System gastronomy
- Professional practitioner in the hospitality industry
- Kitchen specialist (assistant chef)
- Gastronomic assistant
- Hotel specialist (m/f)
- Hotel clerk (m/f)
- Cook
- Restaurant specialist (m/f)

Training in tourism

Other than the above a variety of non-formal training courses in the tourism sector exist such as the following examples:

- Specialist employee for swimming pool companies.
- Specialist in the hotel and restaurant industry.
- Specialist for system gastronomy.
- Flight attendant.
- Air traffic controller.
- Housekeeping assistant.
- Hotel specialist.
- Commercial assistant - foreign languages & correspondence.

Besides these training paths many employees start without a training course and are trained by their employers. Often these are career changers in this sector who acquire their competences through learning by doing.

The professions in the tourism branch are not so-called regulated professions, i.e. a state-recognised qualification is not necessarily required to practise the profession. A regulated profession would be for example the teaching profession.

4 The Company's Perspective on Staff Needs and Recruiting

Due to the first effects of the Covid-19 pandemic it turned out difficult for the project partners to hold their scheduled interviews in February and March and to reach out to additional new companies. In total 19 interviews were held with different companies in Cyprus, Marseille and Berlin.

The aspects explored with the employers were, how they design recruiting processes in their companies and how they assess the current labour market situation, whether they find it easy or problematic to find employees matching to the open positions, and which are the qualifications, competences and skills that they value the most and which are the most important factors for their decision to hire someone or not. Additionally, we asked the employers in which conditions (contracts, salaries, hours) the young



people usually work for them and how they perceive the young people's satisfaction. Finally, we also asked about the employer's perception of international mobilities. Summing up the results of these interviews is the purpose of this chapter.

In Cyprus 7 interviews with hotel and apartment rentals were held (one hotel chain with +500 permanent staff and a few medium-size structures with 24-44 and small hotel businesses with 5-6 employees). Three additional interviews were held with a museum, a dive centre and a botanical garden. In Berlin four interviews were held with different types of services a restaurant, a café, a bus company and a training provider. In Marseille five interviews were held with different types of services. An art gallery and restaurant, a communication agency, a film festival and two organisations that offer socio-professional integration services for young people.

The majority of the interviewees stated that recruiting was a challenging part of their business for different reasons. In all three regions there are for many positions (especially in the hotel, restauration, and catering business) not enough people with the formal qualifications for these tasks. Additionally, there are strong seasonal differences of the amount of work in the sector, which influences the need for staff. This results in a lot of fixed-term contracts during the more touristic season, but this poses a challenge ensure a continuity in the workforce to keep knowledge within the company and a good spirit within the team.

The already mentioned lack of trained staff was especially described for Berlin were mostly in winter it is difficult to find new staff, because there are more people coming to Berlin in summer looking for short term employment. In Cyprus the demand for seasonal workers in the summer season is very high but there is also strong lack of locals interested working in the field of tourism. That's why Cypriot employers (mainly from hotel businesses) built networks with vocational schools in other EU countries (for example Romania, Bulgaria or Poland) where they directly recruit their staff for the summer season, who will then be contracted mostly in internship or apprenticeship programmes with a usual duration of 4 week up to 6 months (some exceptions of one full year). The usual job postings in these programmes include: Waiters, Pool Assistants, Kitchen Assistants, Chefs, Bartenders, Housekeepers, Baristas, Casino Staff, Spa therapist, Front Desk Assistant, Delivery Driver, Taxi Driver.

The smaller structures interviewed described more informal ways for recruiting and sharing job offers such as personal networks of employees, word by mouth or walk ins. They have also made good experiences with posting job offers on social media.

Larger structures have more formal recruiting processes. They are more likely to involve the local employment agencies or use big online job search portals. A special example are the recruiting processes designed by the Cypriot hotels when the recruiters directly travel to vocational schools in other countries and organise application processes in those schools.

Depending on the positions many employers especially in Marseille and Berlin in the hotel, restauration and catering business are open to employ people without formal qualification (if not needed by law) or long work experiences and are open to train them



on the job. Whereas the Cypriot interview partners placed more importance on formal qualifications by the persons they employ and expect 2-3-year diploma specialised for the field. The focus for an employment decision, when not looking at formal qualification lies on good communication skills, being reliable and diligent and high motivation (see also table below). Especially in the smaller businesses it was expressed quite often that the person 'must fit in' to the team and the business and the atmosphere in general, but that these informal requirements are sometimes very hard to assess in an interview, for someone who is not a 'professional recruiter' as it is often in smaller businesses..

It was also mentioned that a certain maturity was preferred by the employers and that there is a reluctance to work with very young and unexperienced persons. This was also explained with the experience that very young people often leave the company once they are trained or even before because they realise they want to do something else or they want to gain more experience in a new workplace.

Especially in the gastronomy, hotel and service sector employers stated that they have a very strong interest in having a good ambience in the team, as they see the connection when the staff is in close contact with the customer and they are not satisfied with the working conditions this would impact the quality of the service. When asked on the factors influencing the satisfaction of their employees most of them mention at first a fair or above-average pay, compensating overtime and valuing in general the work of the employees. Other means employers see to improve the satisfaction of their staff is offering accommodation and subsistence (especially in hotels), to consider all employees as collaborators without imposing a hierarchical aspect between the employer and the employees (example of an art gallery&café), enable access to insurance and retirement contributions and generally invest in the good ambience in the team.

In almost all structures exist indefinite contracts, fixed-term contracts, full-time and part-time contracts in parallel mostly to keep a certain flexibility and react to the seasonal differences in the workload. Although, in some cases the fixed-term contracts result in the following in indefinite contracts.

The interviewed employers have in general a positive image of mobilities and many had direct experience with young people either by receiving international workers or working with young people who returned from a mobility. They stated for them it means that a young person has the curiosity and courage to look elsewhere and has experience with different working styles. They also mentioned positively that working abroad makes someone to adapt to new surroundings, acquire autonomy and open-mindedness.

Some also said that they look at the destination of the mobility, as for them it tells something about the person or it can be attractive for the business to employ someone with certain language skills or ties to a specific country or region.

The most important soft skills and attitudes to work in the companies represented by the interviewees. Those are the most mentioned

Soft skills and Attitudes
Socialize and communicate well
Reliable / Punctual
Integrity, diligence and cleanliness
Take initiative, be productive and motivated
Open-minded and adaptability
Friendly and Charismatic
Endurance
Commitment
Be a team player
Be persuasive
Curiosity
Independent person
To be respectful

All employers were asked for the main reasons to not employ someone in their company. The most mentioned answers in the chart:

Reasons for not employing someone
(Disrespectful) attitude
Not having the required qualifications³
Does not express himself/herself well
Not being punctual
Lack of motivation
Young with no experience
Low self-esteem
Lack of rigor
Does not know how to work in a team

³ In the interviews this reason was given only by Cypriot employers

5 How Covid-19 impacts the work in Sympatic

When project partners reached out to employers and companies in the tourist sector in the beginning of 2020, inviting them to be involved in SYMPATIC the reactions were mostly positive and various appointments for interviews were agreed. With the fast evolvement of the pandemic in the following weeks the tourist economy was one of the sectors hit first and probably hardest by travel restrictions and changed behaviours due to Covid-19. Especially in Lombardy, the region with the first large outbreak of the virus in Europe, but also in the other regions it was suddenly hard to even get in contact with the employers and most of them cancelled the interview appointments as they had too many other emergencies to deal with, and they were reluctant to make any statements about their future involvement in the project. As a reaction the SYMPATIC partnership decided to use this production to gather information from all project partners about the current situation in their region and how they see the planned actions of SYMPATIC impacted by the new situation, which will be summarised in this chapter.

In all project countries (France, Italy, Cyprus and Germany) measures known as 'lockdown' have been taken by the governments starting in February and March. These measures were different in each country but basically aimed all at minimising the risk of contagion with the virus by shutting down places of public life like gastronomy, events, leisure and sports clubs, all shops (except those selling essential goods) and also schools. Additionally, many inner-EU borders were closed for citizens wishing to pass without special reason.

All this had major effects on the economy of all countries. For all countries an important decrease of the GDP is expected and the for tourism and event business this is expected to be even higher and with little possibility for a fast recovery, although France and Cyprus announced to work on a strategies to encourage national tourism during the summer holidays season.

Some relevant examples for the SYMPATIC context are the hotel occupancy rate in the Provence-Alpes Côtés d'Azur region dropped from 52.4% on March 3 to 2.3% on March 29, 2020. And that in the Department Nord, wich belongs to the Hauts-de-France region 26 937 enterprises sent 319 383 employers on partial unemployment between the 15th of March and end of May due to coronavirus, which results in 98% of workers in partial unemployment when looking only at the hotels-restaurants sector in the region Hauts-de-France.

In all countries the governments have set in place financial support mechanisms for the affected businesses that should help to cushion the huge financial losses and prevent bankruptcies and dismissals of employees. But there is great uncertainty for the business owners for how long the financial support programmes by the government will last and what will happen after the end of those programmes.

At the time of this additional survey there was not much communication possible with the businesses contacted for interviews and further involvement in SYMPATIC, but



those reachable were very pessimistic. A hotel owner in Cyprus stated that they had 'zero expectations for this year' and they expect a decrease in tourism of 70%.

Depending on how the pandemic will continue the future perspective for tourism, culture and event business continue mediocre and it is possible that especially small and medium sized companies in this sector risk not to survive or to be forced to reduce their staff. How this will impact the work of SYMPATIC cannot be properly assessed at this moment it can be expected that less employment opportunities will be available especially for young people without experience and/or formal qualifications.

Additionally, the SYMPATIC partner organisations are facing uncertainties in their work with the young people. In Italy for example vocational training centres were closed for a long time and could be closed again, alternation and cooperation with businesses was not possible and offering alternative digital learning was not possible in all training centres and situations. For training centres offering non-formal education or to organise training sessions with young people as preparation to go abroad is also more difficult as all standard Covid-19 security measures need to be respected and facilities of the organisation might not be spacious enough. Finally, it is not clear when and how mobilities can be organised again.

As a reaction to all these uncertainties the SYMPATIC partnership started a common reflection to define alternative ways to go forward with the project without compromising on its original objectives.

The aims of IO1 were to give a detailed overview on the labour market situation in the tourism sector in all project regions and to build a diverse network of companies willing to be involved in SYMPATIC project activities. As the before has shown both is only partially possible as most of the data and information will not be relevant with all the changing circumstances and businesses are reluctant to agree to any cooperation at this time. Thus, this publication should be seen as a contemporary witness of pre-pandemic times and new investigations will to be undertaken when the project activities go on. The same applies to the network building with companies: once the perspective is clear how and when we project activities will be resumed the outreach to the companies will restart to create the most possibilities for young people.

Additionally, the partnership will focus on developing the content of the training curricula in IO2 and IO3 which can be done without constraints. For the implementation of the trainings especially IO2 will be designed in a way that it can also be delivered online. The Learning Teaching and Training Activity will be rescheduled to leave open the possibility to deliver this training in person.

Another possibility which was discussed in the partnership was to widen the type of businesses that we will target with the activities. For now this option was dismissed as a quality of the tutor kit training modules is to focus on sector specific challenges in collaborating with young people in the tourism sector and how to organise a successful onboarding in these types of businesses which would not work so well if we randomised the types of businesses that we work with.



6 Conclusions

Summing up the research undertaken for this 'Occupational Profile' in five different European regions in Cyprus, France, Germany and Italy, it was clear that all four regions had positive expectations for the economic development and unemployment rates were stable or lowering during the last years and in the forecasts for 2020. The positive trends in all regions were seen as well in the tourism sector, which is the focus of SYMPATIC and hence of this Occupational Profile: number of visitors and the turnover of all businesses together was rising during the last years and was expected to rise also in 2020.

But the regions also share similar challenges: one is an elevated youth unemployment rate (except Berlin, where the rate was almost equal to the general unemployment figure in 2019) which was the double or almost triple of the general unemployment figure. In all reports based on a desk research about the tourism industry in the regions the challenge of a skills mismatch or a skills shortage for many jobs in the tourism sector was mentioned and also validated in the interviews conducted within this research. There are different reasons for this mismatch situation as these hard-to-fill positions concern very different professional profiles. As a tendency it can be said that the rather low-qualified positions of which there are always many fixed-term job openings in the beginning of the touristic season, are not so attractive for job seekers due to working conditions (working late or in shifts, many fixed-time contracts in touristic seasons, stressful tasks and also beneath average payments) and there are not enough candidates with formal qualification or relevant previous experience. But the same mismatch problem applies for expert positions or high-skilled profiles which includes sales and marketing, especially online marketing, reception and general management but as well kitchen chef. For some of them the demand is too high and for other positions the candidates don't possess the needed skills as the educational systems do not prepare them sufficiently.

Due to this situation employers agreed more and more to employ persons without formal qualification and previous experience and train them on the job. During recruiting they place much more importance on soft skills and attitudes of the candidate instead of the exact qualification needed. A small insight is given by the interviews held with employers for this Occupational Profile who were asked which skills and attitudes are needed to be employed in their company and across all three reports from the interviews *communication and socialising skills* and being *reliable and diligent* were rated as most important. Equally, when asked for reasons not to employ someone the most given answers were a *disrespectful attitude* and *not being able to express oneself well*. A challenge mentioned by employers when working with people who did not work formerly in the tourist sector, that it happens regularly that they are disappointed by the work or find another work that they prefer and leave the company still during or right after the initial training phase.

The SYMPATIC activities have been designed with the young people as main beneficiaries in mind and aiming at supporting especially those in unemployment and being in disadvantaged situations to develop a professional perspective and progress in their careers. In the light of the findings of this research it seems that also companies

can benefit from a cooperation with mobility organisations in a way that they get in contact with young people who have recently gained work experiences and who are well accompanied by jobcoaches taking conscious decisions on their career choices. Additionally, the tutor kit can support companies in designing onboarding processes that lead to sustainable working relations as young people feel well received in the workplace and prepared for the tasks they should perform.

Of course this is a pre-pandemic scenario and the outbreak of the Covid-19 pandemic in early 2020 changes the main parameters on which the project was built. The almost full stop of touristic travels and all kinds of events in spring 2020 hit businesses completely unexpected and the future scenarios are very insecure, as nobody knows how long this situation will last and if new closures will be necessary. The assumption that the touristic sector is favourable for the SYMPATIC project as there are very regular job opening and also people with little qualifications can enter the job market is no longer true and SYMPATIC needs to constantly monitor the situation to find the best possible way to implement the project activities.

At least it is likely that tourism will continue when the crisis is over and maybe also during times of lower contagion rates and that the skills and competences requested by the companies will not change substantially until the end of this crisis. So, ideally the time can be used to invest in education and training of young people based on the the knowledge gained in this survey and in the numerous studies referenced in this study.

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